Attachment V

Customer Satisfaction Measures

A. Overview of Measurement Approach. To meet the customer satisfaction measurement requirements of WIA, the Department will use customer satisfaction surveys. The survey approach that will be utilized allows State and local flexibility and, at the same time, captures common customer satisfaction information that can be aggregated and compared at a State and national level. This will be done through the use of a small set of required questions that will form a customer satisfaction index. The Department will use the American Customer Satisfaction Index (ACSI), which is created by combining scores from three specific questions that address different dimensions of customers' experience. For WIA application, there will be one score for each of the two customer groups: participants and employers.

The ACSI is the most widely used index currently in practice. It is used extensively in the business community, including over 150 Fortune 500 companies, and in many European countries. Twenty-nine agencies of the Federal government are using the ACSI. In addition, it has been used twice in the past four years to assess customer satisfaction for ETA's Quality Initiative, the Enterprise. The ACSI will allow the workforce investment system to not only look at performance within the system, but also be able to gain perspective on the workforce system's performance by benchmarking against organizations and industries outside of the system. The ACSI also has a history of being useful in tracking change in customer satisfaction over time, making it an ideal way to gauge States' progress "toward continuously improving in performance."

Since the ACSI trademark is proprietary property of the University of Michigan and its software is owned by Claes Fornell International (CFI) Group, the Department has established a license agreement with the University of Michigan that will allow States the use of the ACSI for a Statewide sample of participants and employers. States that want to use the ACSI for measuring customer satisfaction for each local area will have to establish an independent contract with the University of Michigan. States may also contract with CFI Group for additional assistance in measuring, analyzing, and understanding ACSI data.

B. Procedures for the Collection of Information

The procedure requires a sample to be drawn periodically for each of the two populations -- participants and employers. States will draw samples on at least a monthly basis, although they may choose to sample more frequently. States will use a random number table or its automated equivalent to select simple random or systematic random samples. The outcomes from both the participant and employer surveys will be reported quarterly and annually to the Department.

States must ensure the sampling strategies they implement afford every individual (or employer) eligible for the survey an equal opportunity of being chosen for the sample and that the selection of any individual is not affected by the previous selection of individuals eligible for the survey.

Based on an estimated response rate of 50%, States must sample 1,000 participants and 1,000 employers eligible for the survey each program year. Each State must obtain a minimum of 500 completed interviews from each population. The 500 completed surveys will provide an acceptable level of accuracy for the survey results. Accuracy will be expressed as a 95 percent confidence interval. The population mean is expected to be contained within the confidence interval for 95 percent of the samples of the same size and manner of selection.

Participants who exit Title I-funded services (beyond informational and self-service) during the program year are eligible for the survey. The survey excludes deceased persons, institutionalized and incarcerated individuals, and persons who exit services due to prolonged health problems.   Participants should be contacted within 60 days of the exit date or the date that an exit date has been determined. For participants, this means eligible individuals should be interviewed either within 60 days after the date of an exit interview or, in some cases, within 60 days after the 90 days have elapsed since the last service date (soft exit).

Employers who directly benefit from Title I-funded services during the program year are eligible for the survey. Eligible employers should be contacted and interviewed within 60 days of the completion of the service or within 60 days after a job order has been listed where no referrals have been made to an employer.

If a State opts to divide the 1,000 sample selections equally over 12 months (or other sampling interval set by the State), the State must record and report the sizes of the populations from which the samples were selected. This information is needed to apply weights to the survey results in order to correct for over-representing or under-representing opinions of respondents who were selected at different times during the year, when the population of eligible participants (or employers) varies in size.

For example, let's say a State decides to randomly sample each month an equal number of persons eligible for the survey to reach the required 1,000 individuals. That equates to drawing a sample of 84 individuals eligible for the survey each month (1,000 persons divided by 12 months). Because this strategy is likely to over-sample populations in months with smaller populations and under-sample populations in months with larger populations, the final average scores obtained from each month will have to be weighted to reflect the actual distribution of participant exiters across the 12 months. The weighting will be accomplished by taking the total annual population of those eligible to be surveyed as the denominator for each weighting factor and the eligible population for each month as the numerator of each factor. The resulting factor will be multiplied times that month's average score. These monthly weighted averages will be summed to obtain the properly weighted quarterly (3 months) and annual (12 months) estimates for participant satisfaction in each State. A similar procedure will be used for the employer survey.

C. Customer Satisfaction Measures

Measure 16: Participant Satisfaction

The weighted average of participant ratings on each of the three questions regarding overall satisfaction are reported on a 0-100 point scale. The score is a weighted average, not a percentage.

1. Who Will Be Surveyed?

WIA Title I-B participants who are exiters as defined in the core measures, who are either Adults, Dislocated Workers, Youth 19-21, or Youth 14-18 will be surveyed. All individuals from all funding streams in an exit cohort are eligible to be chosen for inclusion in the random sample.

2. How Many (number obtained)?

Except in small States, a sample will be taken from these exiter groups in each quarter. Five hundred completed participant surveys must be obtained each year for calculation of the indicator. A completed participant survey is defined as a survey in which all three questions regarding overall satisfaction have been answered. For small States (those with less than 1000 exiters in a year), the entire population must be surveyed. The response rate from the sample with valid contact information must be a minimum of 50 percent. The standard of 500 from a sample of the whole population of customers provides accuracy such that there is only a 5 in 100 chance that the results would vary by more than ±5 points from the score obtained from surveying the whole population.

3. How (methodology)?

The responses are obtained using a uniform telephone methodology. The rationale for only using telephone surveys include: the comparability of the indicator for assessing performance levels is most reliably obtained with a telephone survey; telephone surveys are easily and reliably administered; and defining procedures for mailed surveys is more difficult than defining procedures for telephone surveys. Estimates of the cost of telephone surveys nationwide run an average of $15 per completed survey. Since it is being proposed that States complete 500 participant and 500 employer surveys, the cost would be an estimated total of about $15,000 per State per year.

4. When to Conduct Surveys?

The surveys should be conducted on a rolling basis within the time frame for participants and employers indicated below. To obtain sufficient numbers, smaller States will need to survey on an ongoing basis. Participants should be contacted within 60 days of the exit date or the date that an exit date has been determined. This means either 60 days after the date of an exit interview or 60 days after the 90 days have elapsed since the last service date.

5. What are the Questions?

A survey conducted by telephone in which the following questions are asked at the beginning of the interview[1]:

My name is ____________ with XXXXX and I am conducting a survey for the XXXX XXXXX. I would like to speak to Ms./Mr.___________.

Are you the Ms./Mr. _________ who was looking for a job a few months ago?

I would like to ask you some questions about your recent experience looking for a job. Our purpose is to learn from you how to improve programs and services offered to people in XXX. The survey should take about XX minutes to complete. First I am going to read a list of services you may have received. Indicate as I read them those you recall receiving during the period in which you were seeking employment and/or training at the XX center.

- A thorough assessment of your needs
- Assistance about finding a job
- Assistance to develop an individual employment plan
- Assistance to decide about the best training to take
- Assistance from someone to support you during your job search or training
- Did you receive any training?
- Occupational training
- Training to give you general skills for the workplace
- Training in English or math

Did you get any other help or services that I have not mentioned? (specify)

[1] Note: The first question can be modified to suit the individual needs of the State and the names for program services recognizable for their population. The lead-in question provided is a model to be used as guidance.

1) Utilizing a scale of 1 to 10 where "1" means "Very Dissatisfied" and "10" means "Very Satisfied" what is your overall satisfaction with the services provided from ________?

Very Dissatisfied								Very Satisfied		DK[2]	REF[3]
1	2	3	4	5	6	7	8	9	10	11	12

2) Considering all of the expectations you may have had about the services, to what extent have the services met your expectations? "1" now means "Falls Short of Your Expectations" and "10" means "Exceeds Your Expectations."

Falls Short of Expectations								Exceeds Expectations		DK	REF
1	2	3	4	5	6	7	8	9	10	11	12

3) Now think of the ideal program for people in your circumstances. How well do you think the services you received compare with the ideal set of services? "1" now means "Not very close to the Ideal" and "10" means "Very Close to the Ideal."

Not Close To Ideal								Very Close To Ideal		DK	REF
1	2	3	4	5	6	7	8	9	10	11	12

<u>Measure 17</u>: Employer Satisfaction

The weighted average of employer ratings on each of the three questions regarding overall satisfaction are reported on a 0-100 point scale. The score is a weighted average, not a percentage.

1. Who Will Be Surveyed?

Those eligible for surveying include employers who have received service where the service has been completed or, if it is an ongoing service, when a full segment of service has been provided (e.g., after listing an open job order, the employer has received some referrals or if no service, 30 days have elapsed after the initial request). All employers who have received a substantial service involving personal

[2] DK = Don't Know

[3] REF = Refused to Answer

contact with One-Stop staff are eligible to be chosen for inclusion in the random sample (this excludes those employers who request a brochure or standard mailing, those who ask a question that is answered with little expenditure of staff time, or those who use electronic self-services).[4] Examples of services include staff facilitated job orders, customized job training, customized labor market information requests, and on-the-job training activities.

When an employer has received multiple services, priority should be given to the service that required the greatest expenditure of funds or staff time[5] and the survey conducted regarding their satisfaction with that service.

2. How Many (number obtained)?

Except in small States, a sample will be taken from these employers in each quarter. Five hundred completed participant surveys must be obtained each year for calculation of the indicator. A completed employer survey is defined as a survey in which all three questions regarding overall satisfaction have been answered. For small States (those with less than 1000 employers who received a substantial service in a year) the entire population must be surveyed. The response rate from the sample with valid contact information must be a minimum of 50 percent. The standard of 500 from a sample of the whole population of customers provides accuracy such that there is only a 5 in 100 chance that the results would vary by more than ±5 points from the score obtained from surveying the whole population.

3. How (methodology)?

The responses are obtained using a uniform telephone methodology. The rationale for only using telephone surveys include: the comparability of the indicator for assessing performance levels is most reliably obtained with a telephone survey; telephone surveys are easily and reliably administered; and defining procedures for mailed surveys is more difficult than defining procedures for telephone surveys. Estimates of the cost of telephone surveys nationwide run an average of $15 per completed survey. Since it is being proposed that States complete 500 participant and 500 employer surveys, the cost would be an estimated total of about $15,000 per State per year.

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[4] This standard is similar to the participant standard that distinguishes core services (information/self-service) from those services that warrant registration.

[5] Where an employer has received multiple services in a given time period, and there is separate contact information for each service, the contact information for the priority service should be used for surveying.

4. When to Conduct Surveys?

The surveys should be conducted on a rolling basis within the time frame indicated. To obtain sufficient numbers, smaller States will need to survey on an ongoing basis. Employers should be contacted within 60 days of the completion of the service or 30-60 days after a job order has been listed where no referrals have been made.

5. What are the Questions?

A survey will be conducted by telephone in which the following questions are asked at the beginning of the telephone interview (the first question is a sample and can be modified to suit the needs of individual states):

A survey conducted by telephone in which the following questions are asked at the beginning of the interview[6]:

My name is ____________ with XXXXX and I am conducting a survey for the XXXX XXXXX. I would like to speak to Ms./Mr.___________.

Are you the Ms./Mr. _________ who (describe the service received).

I would like to ask you some questions about your recent experience with ________. Our purpose is to learn from you how to improve programs and services offered to employers. The survey should take about XX minutes to complete.

1) Utilizing a scale of 1 to 10 where "1" means "Very Dissatisfied" and "10" means "Very Satisfied" what is your overall satisfaction with the service(s) provided from ________?

Very Dissatisfied									Very Satisfied	DK	REF
1	2	3	4	5	6	7	8	9	10	11	12

2) Considering all of the expectations you may have had about the services, to what extent have the service(s) met your expectations? "1" now means "Falls Short of Your Expectations" and "10" means "Exceeds Your Expectations."

[6] Note: The first question can be modified to suit the individual needs of the state and the names for program services recognizable for their population. The lead-in question provided is a model to be used as guidance.

Falls Short of Expectations									Exceeds Expectations	DK	REF
1	2	3	4	5	6	7	8	9	10	11	12

3) Now think of the ideal service(s) for people in your circumstances. How well do you think the service(s) you received compare with the ideal service(s)? “1” now means “Not Very Close to Ideal” and “10" now means “Very Close to the Ideal.”

Not Close To Ideal									Very Close To Ideal	DK	REF
1	2	3	4	5	6	7	8	9	10	11	12

D. Definition of Terms

Sample. A group of cases selected from a population by a random process where everyone has an equal probability of being selected.

Response rate. The percentage of people who have valid contact information who are contacted and respond to the questions on the survey.

Valid contact information. Information that leads the interviewer or surveyor to the location where the contact individual is located whether or not the individual responds and answers the questions.

E. The Calculation

The calculation for the American Customer Satisfaction Indicator (ACSI) is accomplished by calculating the weighted average of the raw scores for each of the customer satisfaction questions given by each respondent. The weighted average score is then transformed to an index reported on a 0-100 scale. The aggregate index score is simply the weighted average of each case’s index score.

Notes: CFI Group will provide the actual weights given for (W1), (W2), and (W3) below. In calculating respondent level index scores, round to two decimal points.

When calculating the average index score, round to the nearest whole number. For any case, the general formula for calculating the index score is given as:

Index Score = {[(Q1)(W1) + (Q2)(W2) + (Q3)(W3)] -1} x 11.111

where:

Q1 = raw score on question #1	W1 = weight for question #1
Q2 = raw score on question #2	W2 = weight for question #2
Q3 = raw score for question #3	W3 = weight for question #3

Example:

If the respondent answers were 5, 8, and 9 respectively for each of the three customer satisfaction questions, and the weights for each of the three questions were .4, .2, and .4* respectively the calculation for the respondent's index score would be as follows:

{[(5)(.4) + (8)(.2) + (9)(.4)] - 1} x 11.111 =

{[7.2] - 1} x 11.111 = 68.89

If two more respondents whose on the three questions were 6, 10, and 6 and 9, 6, and 7 respectively, using the same weights listed above, those two respondent's index scores would be:

64.44 and 73.33. To calculate the aggregate index score, simply average the individual respondent's index scores and round to the nearest whole number as follows:

68.89 + 64.44 + 73.33 /3 = 69

* These weights are examples only, CFI group will provide the actual weights.